



Nassau Life and Annuity Company (the Company)
Nassau Life Insurance Company (the Company)
PHL Variable Insurance Company (the Company)
Nassau Life and Annuity Insurance Company (the Company)

Direct Deposit
Quick Reference



Attached is the form you requested. In order for your request to be processed in a timely manner, the **sections referenced below must be completed on the accompanying form.**

Sections A - D	All sections must be completed in order for the form to be processed. If you are requesting that your payments be deposited to a checking account, please be sure to attach a voided check from that account in the area indicated on the form.			
Signatures	Signature requirements are based on the owner designation of the policy/contract. Examples are: • Individual: Print and sign your full name as it appears on the policy/contract. • Trust: The current trustee(s) must sign. • Entity: The current entity must sign. <i>All signatures must be dated in order to process your request.</i>			
Contact Information	US Mail PO Box 22012 Albany, NY 12201-2012	Shipping / Overnight 15 Tech Valley Dr., Suite 201 East Greenbush, NY 12061-4142	Phone (800) 541-0171	Fax (321) 400-6317



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PO Box 22012, Albany, NY 12201-2012

Direct Deposit

A. Account Information

Policy/Contract Number	Insured/Annuitant Name(s) (Print full name)	
Daytime Telephone Number (include area code)	Mobile Telephone Number (include area code)	

B. Deposit Account Please note that we do not accept starter checks.

All deposits can only be made to the owner(s) of the contract/policy. A voided check or letter on bank letterhead signed by a bank officer validating your account must accompany this form. Starter checks, handwritten information, and deposit slips will not be accepted. If account cannot be validated, or any requirements are missing, a check will be mailed to your address of record.

Attach Voided Check Here

C. Payee Authorization Statement Your bank may take 1-5 business days to reflect the deposit.

I am entitled to receive payments. I hereby authorize the Company to send all payments due to me by Direct Deposit to the account designated above. This authorization shall be effective until further written notice from me is received by the Company and the Company has had reasonable opportunity to act on it. I expressly acknowledge and understand that any Direct Deposit payments made under this agreement will be strictly an accommodation made to me by the Company, that this authorization revokes all prior payment instruction, and that the Company reserves the right to discontinue or decline to honor this agreement at any time.

Recovery Provisions: To correct any overpayments credited to my account during or after my lifetime, I hereby authorize and direct the bank or other depository on my behalf, on behalf of my estate to debit or charge my account and refund such overpayment to the Company. I also agree such payments will be returned to the Company.

D. Consent

By signing, I authorize insurance companies and bank account verification services to provide information to the Company, its affiliates, service providers or its reinsurers. Any information will be used only for the purpose of risk evaluation, validation of bank account ownership or as required by law.

I authorize the preparation of bank account authentication report. I understand that upon request, I am entitled to receive a copy of the bank account authentication report.

This authorization shall continue to be valid for 30 months from the date it is signed unless otherwise required by law. I understand my authorized representative or I may receive a copy of this authorization on request.

Opt Out

☐ I do not consent. I understand that if I do not give my consent, a direct deposit of my surrender proceeds will not be available and instead a check will be mailed to my address on file with the Company.

Signatures

Individually Owned:

Print full name of policy/contract owner(s): _____ SSN: _____

Individual Owner's signature: _____ Date: _____

Joint Owner's signature: _____ Date: _____

Trust Owned:

Print full name of trust including date of trust: _____ TIN: _____

Print full name of trustee(s): _____

Trustee(s) signature: _____ Date: _____

Entity Owned: (corporate resolution required if not on file)

Print full name of Company: _____ TIN: _____

Print full name and title of authorized signor: _____

Authorized signature: _____ Date: _____